



Kentucky Department for Libraries and Archives  
Local Records Program

## Grant Application



Please review *Local Records Grant Guidelines* and consult with your *Regional Administrator* before completing this form. Use extra sheets if necessary and attach three written, itemized, project bid proposals for each project section. Please send the completed forms to:

Local Records Branch  
Kentucky Department for Libraries and Archives  
P.O. Box 537  
Frankfort, Kentucky 40602-0537

### Part A: Contact Information

Applicant Name: TERESA CULVER MARRINAN

Applicant Title: WASHINGTON COUNTY CLERK

Office Address: P O BOX 446 / 117 N CROSS MAIN ST  
SPRINGFIELD KY 40069

Phone Number: (859) 336-5425

Email Address: teresa.marrinan@ky.gov

Federal ID Number: 6 1 6 0 0 0 9 6 4

### Part B: Project Summary

Total Funds Requested: \$ 77,030.00

Please provide a complete description of the proposed project. Describe the project scope and the anticipated finished product(s). Explain why these records were selected for preservation as well as their historical significance and relevance to the community. Provide proposed methods for handling the records to ensure they conform to generally accepted archival and records management standards. See the guidelines for additional examples and attach additional sheets, if needed.

The proposed project is for a Computer Records Management System, roller shelving and double faced roller shelf desk. The Computer Records Management System is needed to replace the current outdated system used by the Washington County Clerk's Office. The roller shelving and double faced roller shelf desk will allow me to free up much needed space for my books of current and future recordings in my main research vault, as well as making my research room of historical and older recordings more accessible, manageable, and secure. Please see attachment for additional information.



Kentucky Department for Libraries and Archives  
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**Plan of Work**

Please list preferred project vendor(s) for each section, vendor addresses, and vendor phone numbers. (If not selecting lowest bid proposal, please attach a justification.)

**Section 1**

Vendor Name: SOFTWARE MANAGEMENT LLC  
Vendor Address: 2011 COBALT DR  
LOUISVILLE KY 40299  
Vendor Phone and Email: (502) 266-9445 sbaird@smllc.us

Purpose: Security Microfilming ☐ Digitization ☐ Conservation ☐ Codification ☐ Salary ☒ Equipment/Supplies ☐  
(Select all that apply)

Records	Date	Series	Cost
<i>Example: Deed Books A-Z</i>	<i>1799-1858</i>	<i>L1317</i>	<i>\$6,255</i>
COMPUTER RECORDS MANAGEMENT INDEXING SYSTEM			
SOFTWARE			\$42,000
HARDWARE			\$25,500
Diazo Cost for _____ Copies			
Quality Control (Add 12.5% of the microfilming cost)			
Total Cost			\$67,500

**Section 2**

Vendor Name: TRI-STATE SYSTEMS  
Vendor Address: 85 SOUTHVIEW DR  
CADIZ KY 42211  
Vendor Phone and Email: (270) 881-7295 JIMMY CALVERT

Purpose: Security Microfilming ☐ Digitization ☐ Conservation ☐ Codification ☐ Salary ☒ Equipment/Supplies ☐  
(Select all that apply)

Records	Date	Series	Cost
<i>Example: Shelving</i>	<i>N/A</i>	<i>N/A</i>	<i>\$9,040</i>
ROLLER SHELF AND DOUBLE FACED ROLLER SHELF DESK			\$9530
Diazo Cost for _____ Copies			
Quality Control (Add 12.5% of the microfilming cost)			
Total Cost			\$9530

**\*\*Please Attach Additional Sections, if needed.\*\***



## Kentucky Department for Libraries and Archives Local Records Program

### Commitment of Local Government:

Explain the local government's commitment to a comprehensive records management program (appropriate disposition of records, designation of a records officer, and training of records personnel in records management techniques). Please detail how your office will commit resources to this project (adequate office, storage or working space; personnel; supplies; equipment; or a monetary contribution).

The Washington County Clerk's Office has a comprehensive commitment to their records management program, because I personally have a strong passion and commitment to the records management process in Washington County. I have always taken pride in my job and the knowledge that I have gained over the years as the recording clerk. It has given me a strong appreciation of the importance of records management and preservation. I will budget funds for continued improvement and maintenance of the proposed system to ensure that the appropriate standards are followed. I will make sure my staff has adequate training of the system and that the system will be secure and records backed up.

Are these records stored in secure, fire resistant facilities? If no, please explain how the project will safeguard the records in questions.

Yes ☒ No ☐

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Is access to these records in compliance with the state's Open Records Law (KRS 61.870-876) and in an area with proper security and supervision? If no, please explain how this project would ensure compliance.

Yes ☒ No ☐

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**Kentucky Department for Libraries and Archives  
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**Part C: Project Outcomes**

1. How will this project ensure the preservation of and/or increase public access to these records? What benefit will this project be to your agency and community? How will you disseminate information about this project and its outcomes to the public?

This project will ensure the preservation of our records by allowing us to have more secure backups of the information and images, as well as an extremely better process of records management, and with the development of a Website for online searches, it will increase the accessibility of the community to the records. It will allow our PVA Office, local banks and attorneys access to the records from their locations, in turn helping the community as a whole.                      See attachment for additional information

2. Did you consult with your Regional Administrator while completing this application?    Yes ☒    No ☐

3. Can these records be removed from the office during the project?                      Yes ☐    No ☐    N/A ☒

4. In what format do these records exist? Select all that apply.

Paper ☒ Electronic Files ☒ Microfilm ☐ Microfiche ☐ Aperture Cards ☐

Other: DATA AND IMAGES STORED IN OUR CURRENT COMPUTER SYSTEM

5. Can this project be completed within a single grant cycle (18 months)?    Yes ☒    No ☐  
(grant cycle for Salary grants is 48 weeks)

6. Additional information/comments:

**SEE ATTACHED**

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## Kentucky Department for Libraries and Archives Local Records Program

### Part D: Certification

Statement regarding expenditure of funds: The applicant agrees that funds granted under the Local Records Program will be spent solely in accordance with the project description and budget statement presented in this application. The grant recipient acknowledges that any changes in the submitted plan of project work, funding, or length must be submitted in writing to, and approved in advance by, the Kentucky Department for Libraries and Archives.

Statement regarding archival and records management policies and procedures: The applicant agrees to comply with all policies, procedures, and standards deriving from Kentucky Revised Statutes, Kentucky Administrative Regulations, as well as the policies of the Kentucky Department for Libraries and Archives and the State Libraries, Archives, and Records Commission concerning management, preservation, reproduction, and storage of public records in addition to those dealing with the official recording of such records in government offices, whether on paper, microfilm, or other medium.

Statement regarding project status and financial expenditure reporting: The applicant agrees to submit biannual Project Status and Financial Expenditure Reports during the course of the project and at the end of the project as specified in the grant contract. The grant recipient also agrees to create a separate grant fund account, maintain separate financial and programmatic records on this project, and retain source documentation such as canceled checks, paid invoices, payrolls, or other accounting documentation, which would facilitate an audit as required by statute, regulation, or administrative procedure.

Statement regarding continued records management and preservation support: The applicant agrees to make budgetary allowance to continue the work begun by this project to better manage, preserve, and secure the current and future records of this agency. The applicant also recognizes that such an allowance is a necessary operating expense that must be budgeted for on a regular basis

Statement regarding the Americans with Disabilities Act: The applicant agrees to comply with the Title II provisions of the Americans with Disabilities Act and to submit to the Department, upon request by the Department, documentation that demonstrates compliance with the Title II requirements of the Americans with Disabilities Act.

  
Authorized Local Government Official

TIM GRAVES WASHINGTON COUNTY JUDGE

Typed or Printed Name and Title

04/11/19

Date

  
Official Custodian of Records

Teresa Culver Marrinan, Washington County Clerk

Typed or Printed Name and Title

04/11/19

Date

**TERESA CULVER MARRINAN**  
**WASHINGTON COUNTY CLERK**  
**PO BOX 446 / 117 N CROSS MAIN ST**  
**SPRINGFIELD KY 40069**  
**(859) 336-5425 FAX (859) 336- 5408**  
**[teresa.marrinan@ky.gov](mailto:teresa.marrinan@ky.gov)**

**04/11/2019**

The Office of Teresa Culver Marrinan, Washington County Clerk is requesting a grant to upgrade their Computer Records Management Indexing System, shelving, and a double faced roller shelf desk. I was elected to the position of Washington County Clerk and started my term this year. I have worked in this Office for 25 years, and have been in charge of the land recordings for at least 20 of those years. I am committed to the process to recording vital documents. I understand the importance of the security, preservation, and accessibility of these records.

The current system we have was developed by two individuals with computer programming and database maintenance backgrounds. It has been the only system used in the Washington County Clerk's Office for the last 20 years. It is in great need of being updated/replaced. The developers can't provide the necessary support and turnaround time that is vital to the office. The system can't be updated to allow our office to run as efficiently as we need to. I am seeking this grant for a Computer Records Management System to improve the management and preservation of the public records for Washington County.

The proposed project for the roller shelving and the double faced roller shelf desk will allow me to free up much needed space in the main vault research room. I only have book shelving space for the next five (5) months based on the average volume of documents taken in. I would put the roller shelving and desk in the vault that holds our historical and older records. They will be used to hold deed and mortgage books from the main vault, giving me room for my most recent recordings. The double faced roller shelf desk will make the historical vault research room a great deal more accessible as well. We are the first Kentucky county, so we have a lot of genealogy researchers that come from all over the states, to search their family histories. The desk will allow for a great research area while it serves the purpose of storing books, as well as making the vault room more wheelchair accessible.

I can't even stress the tremendous benefit this combined project will have on the Washington County Clerk's Office. It will increase the efficiency of our overall management, preservation and handling of records, as well as the improvement in accuracy and security.

I will proudly announce and discuss this project to the local newspaper, radio stations, post on our Facebook page, and do an interview on our local cable channel that is broadcast on youtube. I take extreme pride in my performance as Washington County Clerk and the improvements made that will benefit generations to come.

The proposed Computer Records Management System offers a great deal of functionality, it includes Marriage License, Delinquent tax system, and required monthly reports that we currently do manually.

Software Management will also provide onsite training , develop and maintain a website for the Washington County Clerk's Office at no additional charge. The data and images of records we have in our current system, will be converted by Software Management to the new system at no additional charge.

I feel Software Management's Computer Records Management System is well established, and they have a great reputation with the County Clerk's that they already do business with. They are a stable company that will provide any necessary support that would be needed.

In closing, I would just like to stress the importance and extreme need the Washington County Clerk's Office has for a new Computer Records Management System and shelving. It will greatly improve the operation of my office. I am very passionate and dedicated to my responsibilities to preserve and secure the vital records of Washington County. I have wanted improvements and have recognized the significance these much need improvement can benefit the office for a long time and now that I am Clerk I will strive to see that it is done. The approval of this grant will make this happen.

Sincerely

A handwritten signature in cursive script, reading "Teresa Culver Marrinan". The signature is written in dark ink and is positioned above the printed name.

Teresa Culver Marrinan

Washington County Clerk

**LIST OF BIDS RECEIVED FOR COMPUTER RECORD MANAGEMENT SYSTEM**

**SOFTWARE MANAGEMENT LLC      \*\*SELECTED VENDOR\*\***

EQUIPMENT/HARDWARE    \$25,447.00

SOFTWARE/SERVICE FEES    \$42,000.00

THIS WOULD BE FOR 5 YEARS    TOTAL COST    \$67,447.00

**DRMS**

EQUIPMENT/HARDWARE    \$43,192.00

SOFTWARE/SERVICE FEES    \$67,200.00    (\$1,400.00 X 48 MONTHS)

THIS WOULD BE FOR 4 YEARS    TOTAL COST    \$110,392.00

**BIS**

EQUIPMENT/HARDWARE    \$18,717.00 (above having to us our existing hardware)

SOFTWARE/SERVICE FEES    \$40,000.00

PLUS MAINTENANCE COST \$32,000.00 (\$8,000 PER YEAR FOR 4 YRS)

7,500.00    MARRIAGE LICENSE    \*

7,500.00    DELINQUENT TAX    \*

15,000.00    TITLE LIEN STATEMENTS    \*

\*These are included in the other vendor packages at

No additional charge

THIS WOULD BE FOR 5 YEARS    TOTAL COST    \$120,717.00

**COTT SYSTEMS, INC**

EQUIPMENT/HARDWARE    \$76,450.00

SOFTWARE/SERVICE FEES    \$40,900.00

THIS WOULD BE FOR 5 YEARS    TOTAL COST    \$117,350.00





## **WASHINGTON COUNTY CLERK'S OFFICE**

### **PROPOSAL TO UPGRADE AND/OR ADD COMPUTER EQUIPMENT & SYSTEM SOFTWARE**

**PROPOSAL #115-32619**

This proposal includes the work product and consulting services of Software Management, LLC. It may not be used or disclosed outside the Washington County Clerk's Office, and may not be duplicated, in whole or in part, for any purpose other than evaluation of this proposal. Disclosure of this proposal to persons outside of the Washington County Clerk's Office may result in billing for these services. This restriction does not limit the Washington County Clerk's Office right to use information contained herein if it is obtained from another source without restriction.

## EQUIPMENT UPGRADE & ADDITIONS

This proposal is submitted in response to the Clerk's request to upgrade and/or add additional computer equipment. Based on a site visit and/or conversation with the Clerk and her staff, the following equipment recommendations are presented herein.

### SYSTEM EQUIPMENT RECOMMENDATIONS

**(1) PRIMARY DOMAIN CONTROLLER/CCLIX SERVER, FILE SERVER(USING EXISTING SERVER):**

These Dell 110 tower systems will each include; Microsoft Server 2012 Standard, 8G memory, dual redundant 495w power supplies, 5 year NBD on-site warranty, PERC H710 controller, Security Bezel and RAID 6 storage capacity of at least 1TB based upon industry recommendations and system application requirements. Synology 2 bay SHR-Raid external drives for backup rotation/multi versioning will be included. New software systems will include SQL Server 2012 Express, LogMeIn remote access software, and a 5-year monitored, auto-updated anti-virus protection Webroot subscription. A 20" flat-screen monitor, Tripp Lite 900w battery backup, keyboard/mouse and networking switch are included as well.

**(2) PUBLIC ACCESS WORKSTATIONS:**

These workstations each consist of a DELL Windows 10 Optiplex 7050 computer with 8GB memory and storage capacity of 500GB. A 22" flat panel color monitor, keyboard, mouse, and 5-year monitored, auto-updated anti-virus protection Webroot subscription, LogMeIn remote access software as well as WinSelect software protection to prevent unauthorized system access are also included. SQL 2017 and Server 2016 CAL's included.

**(1) INSTRUMENT DEPARTMENT SCAN WORKSTATION:**

This workstation will consist of a DELL Windows 10 Optiplex 7050 computer with 8GB memory and storage capacity of 500GB. A 22" flat panel color monitor, keyboard, mouse and 5-year monitored, auto-updated anti-virus protection Webroot subscription. Software Management systems access is provided, LogMeIn remote access software as well as Microsoft Office 2016 Standard. This workstation also includes Fujitsu 7160 scanner interface software with an 8 ½ x 14 duplexing scanner and an Epson TM-U675 receipt printer. SQL 2017 and Server 2016 CAL's included.

**(4) INSTRUMENT POST WORKSTATION:**

This workstation will consist of a DELL Windows 10 Optiplex 7050 computer with 8GB memory and storage capacity of 500GB. A 22" flat panel color monitor, keyboard, mouse, and 5-year monitored, auto-updated anti-virus protection Webroot subscription. Software Management systems access is provided, LogMeIn remote access software as well as Microsoft Office 2016 Standard. This workstation also includes an Epson TM-U675 receipt printer. SQL 2017 and Server 2016 CAL's included.

**Equipment / Software Pricing****EQUIPMENT PURCHASE AND SOFTWARE PAYMENT DETAILS**

Includes Equipment, Installation, Maintenance Services,  
Data Conversion, Training, Software Services

**PURCHASE:****Total Purchase Price:**

(Includes 5 Year Repair/Replace Maintenance)

**\$25,447.00**

**Software License and Service Fees for 5 Years (itemized on page 5):**

5 years' service **\$52,500.00**

New Customer Discount **-\$10,500.00**

**Total Cost(Clerk Software) \$42,000.00**

Annual **\$10,500.00**

Monthly Starting Year 2 **\$875.00**

**SOFTWARE LICENSE & SERVICE FEES**

Annual service fees include the following:

- License to run software
- Comprehensive user documentation manuals
- Help Desk phone support for problem resolution
- Periodic error correction
- Periodic release of modifications to the software
- Periodic release of new applications<sup>1</sup>
- Periodic updates to the user documentation manuals

SOFTWARE LICENSE & SERVICE	ANNUAL	MONTHLY
CCLIX <sup>®</sup> (Land Records, Marriage Licenses, Securities and Cashiering)	\$2,468.40	\$205.70
Delinquent Tax/Franchise Billing System <sup>®</sup>	\$2,468.40	\$205.70
Posts	\$2,468.40	\$205.70
Posts Payables	\$3,094.80	\$257.90
<b>TOTALS</b>	<b>\$10,500.00</b>	<b>\$875.00</b>

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<sup>1</sup> Applicable whether equipment is purchased or leased.

### SOFTWARE SYSTEM TRAINING

- **ON SITE TRAINING**

ON-SITE training is provided for all software systems, allowing users to receive hands-on training in the comfort of your office. Some benefits of on-site training include:

- Maximum employee participation
- No travel expenses or time off for travel
- Your computer system is customized for you on the day of training

ON-SITE Training includes:

- Up to Five (5) full-days comprehensive training session  
*Additional training will be billed at an hourly rate if needed.*

**EQUIPMENT MAINTENANCE PROGRAM**

Software Management's "Repair or Replace" Hardware Maintenance Program is one of the most inclusive on the market today. The covered services are detailed as follows:

<b>"REPAIR OR REPLACE" HARDWARE MAINTENANCE PROGRAM</b> Software Management's "Repair or Replace" Hardware Maintenance Program is one of the most inclusive on the market today. The covered services are detailed as follows:	
<b>DEPOT REPLACEMENT</b>	When entire components require replacement, Software Management ships the new component and sends a Call Tag via UPS for the defective component. Customer cost: \$0.00
<b>ON-SITE SERVICE</b>	A Software Management representative or local service provider is sent to the customer site within 24 hours to repair/replace any defective part that cannot be replaced via Depot Replacement. There are no additional charges for travel or on-site repair time. <b>EXCEPTIONS:</b> Damage caused by lightning, power surges, negligence or accident.
<b>UPGRADING OF EQUIPMENT</b>	When purchasing Software Management's Repair/Replace Warranty, any covered item that is no longer manufactured, or is not available, will automatically be upgraded at no additional cost to the customer. Parts replacement is guaranteed to be the same or better for the term of the warranty.
<b>FILE PROBLEMS CREATED BY HARDWARE MALFUNCTION &amp; BASIC SITE ADMINISTRATION</b>	When purchasing Software Management's Repair/Replace Warranty, remedy of file problems created by hardware malfunction is included. Off-site 'basic' administration services (e.g., backup verification, periodic key tests and remedy, etc.) are also included with this program when remote access is available. <b>EXCEPTIONS:</b> File Remedy is not included if any of these three items apply: 1) Customer does not have a Software Service Agreement with Software Management; 2) Customer does not have a valid backup; or 3) Customer has not performed regular routine key testing of all systems.

## **WASHINGTON COUNTY CLERK WEBSITE AND eCCLIX ONLINE RECORDS SYSTEM**

Software Management LLC (SMLLC) agrees to develop and maintain a website for the Washington County Clerk's office and will incur all costs associated with the development and maintenance of the website. The website will initially contain the following:

- Contact Information / Request of Information
- Motor Vehicles Information
- Voter Registration – Links / Election Results
- Commonly Requested Forms
- eCCLIX Records Look-up  
(In agreement with the county clerk)

Significant changes to the layout or information contained in the website after the initial launch may require developmental fees that are not covered under this agreement.

Upon completion of the website, the clerk agrees that Software Management LLC will administer the Washington County Clerk's eCCLIX online records look-up service. Interested parties will apply and register through Software Management's office and all subscribers will be required to pay monthly subscriber fees\* billed by SMLLC to offset the costs of administering and maintaining the website. All users are required to abide by the Terms and Conditions of use. This policy along with a disclaimer of contents will reside on the website and acceptance by subscribers is required as a part of the registration process. All records and images are, and will remain, the property of the Washington County Clerk and by signing this agreement, the clerk agrees that SMLLC will only be managing and maintaining the images and records that are accessible on the website.

*\*We will provide free access to users who reside in Washington County. This access will allow residents of Washington County to search up to five documents a day 24/7 for free.*

Software Management, LLC

Washington County Clerk's Office – Proposal #115-32619

ACCEPTED BY:  
Authorized Representative for  
Washington County, Kentucky

\_\_\_\_\_  
AUTHORIZED SIGNATURE

\_\_\_\_\_  
Honorable Teresa C. Marrinan  
PRINT NAME

\_\_\_\_\_  
Washington County Clerk  
TITLE

DATE: \_\_\_\_\_

If accepted, sign the enclosed unbound copy and return via DocuSign or US Mail or fax ☎ to  
(502) 266-9447 to:  
Software Management, LLC  
2011 Cobalt Drive  
Louisville, KY 40299

- ☐ **PURCHASE INCLUDING FIVE YEARS MAINTENANCE**  
AS DETAILED ON PAGE 4
- ☐ **ANNUAL SOFTWARE**
- ☐ **MONTHLY SOFTWARE**

**NOTE: Retain this copy in your files for audit purposes**





Honorable Teresa C. Marrinan  
Washington County Clerk  
Springfield KY 40069

March 26, 2019

Dear Teresa,

We are pleased to submit the following proposal for your review. We at DRMS are truly grateful for the opportunity to earn your business.

Attached is your Hardware and Software Lease Agreement for all computer hardware, peripherals, servers, printers and scanners. It includes discount prices when placed as a complete comprehensive order. Under this proposed agreement, DRMS is 100% responsible for the wellness of the equipment including service calls and repairs.

Additionally, We have made our software cost extremely viable through entering into a partnership with clerk offices that allows DRMS the exclusivity for the distribution of bulk public information as well as online subscription services. This allows us to pay for the Shadow protect software, Cloud replication services and a back-up of your information on an offsite server. These services cost upwards of \$2,000 monthly but the cost is offset through this relationship. These services are necessary to protect the integrity of your office, the records and to prevent any virus threats such as Ransomware.

Respectfully,

Trace Kirkwood  
Marketing Manager  
Data Records Managment Service, LLC



**DRMS turn-key solution:**

This solution is designed to maximize up time, provide a stress free network and includes all hardware and software required to perform daily operations for one low monthly manageable price. All software and hardware products are procured by DRMS to meet the necessary functions of each individual office. NO more worries or surprises as to what you may spend this month. Our Turn-Key solution includes travel, labor, hardware components and DRMS software upgrades(\*) Should a hardware product fail, DRMS will repair or replace in an effort to minimize interruption of service at our expense(\*\*).

Our monitoring systems self diagnose the network repeatedly. An occasional or critical incident immediately is broadcast to our nerve center where our technicians are ready to respond instantly. Chances are we will know about the problem before you do.

So the only question is, are you ready to move up to a stress free network and eliminate the guessing game?

\*Consumables are the responsibility of the clerk's office

\*\*Product must not show signs of tampering or abuse and must be stored in a secured environment

\*\*\*any interruption to the service that is caused by anything outside of normal wear and tear will be charged at our hourly rate for repairs. (example: Lightening strike, accidents to equipment, accidental or deliberate deletions of software or data, etc...)



DRMS product suite lease includes free software updates and unlimited help desk phone support, fax, and email support.

**DRMS Product Suite**

- Land Records
- Delinquent Tax
- Title Liens
- Marriage
- POS and Monthly, Quarterly payable reports
- Web-site creation and management

**Additional Services performed by our personnel in Paducah, Kentucky:**

- State Certified Microfilm Writers & Conversion to or from Digital
- Scanning or Digitizing Services
- Indexing services
- Platt Scanning
- Tax Bill Creation and Mailing
- Software Engineering
- All Support including Help Desk Support

**Software and Hardware Maintenance**

- Help Desk Support is available 7:00am to 5:00pm Monday-Friday and available personnel on call for weekends.
- Software Maintenance is provided free of charge within existing proposal
- On-Site Hardware Maintenance on equipment 5 years old or less is provided with Lease Agreement

**Proposed hardware structure:** Each new Dell Optiplex Business Class workstation includes all necessary licenses including antivirus and software for replication to cloud and NAS back-up.

The provided scanners and Epson printers are designed to optimally perform at the admin stations. The server includes all licenses including MS server, MS client licenses and SQL Server.



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### **DRMS 48 month stress free applications:**

Turn key Products are available on 48 month terms with one low monthly payment. No product worries or concerns as all hardware and software are guaranteed by DRMS. All computer hardware is directly warranted by Dell 24x7, NBD support for a full 5 years. We only use national recognized brands like HP, IBM, Epson and Minolta. DRMS will service all equipment and will repair or replace all equipment under our service contract without your office ever being invoiced including onsite service calls. This pertains to any equipment under contract excluding consumables.

#### **Proposed Hardware:**

<b>Washington County Clerk</b>	<b>Cost</b>
2 Public Terminal	\$2,596.00
5 Admin Terminal	\$7,500.00
2 Epson receipt Printer/Lodger	\$1,598.00
2 Admin Scanner	\$5,998.00
1 DellServer	\$12,900.00
NAS and Check Point security	
1 router	\$4,500.00
Dell components extended 5 year maintenance	\$4,250.00
Other components extended 5 year maintenance	\$3,850.00
<b>Total</b>	<b>\$43,192.00</b>

The hardware specified above includes a NAS back up to your server as well as a security router that contains live updates daily in an effort to protect your networks integrity against various external threats including Ransom Ware.

#### **DRMS Proposed Software Suite consist of the following:**

- Land Records
- Delinquent Tax
- Title Liens
- Marriage Application
- Website creation and Management

Entire lease of software will be installed on 5 admin stations, 2 public computers  
Conversion of current data, installation, configuration of new network and up to 4 days of training is priced at 54 hours of professional services at \$125.00 per hour = \$6,750.00

Monthly lease of software suite is \$1,400.00

#### ***General Terms & Conditions***



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DRMS will enter into agreement with Washington County Clerk's office with intent to lease Software and provide Hardware equipment and maintenance for the next 48 months.

1. A signed Premium Support Agreement is required for all leased equipment;
  - a) The Premium Support Agreement (software assurance program) is necessary to keep pace with technology and to insure that the Customer's investment in DRMS software is protected.
  - b) DRMS Software Maintenance and Premium Support will overlap the duration of the term.
2. Payment terms will be enforced on all accounts. Amounts 30 days past due are subject to a service charge at the maximum rate of interest permitted by law until paid. Customer shall pay all of Data Records Management Services, LLC's costs and expenses incurred in the collection of any outstanding amounts, including reasonable collection agency or attorneys' fees, court filing fees and other disbursements.
3. Applicable sales and use taxes are not included in the quoted prices. Any county, city, state or federal sales or use tax applicable to this sale is the responsibility of the purchaser. Tax-exempt agencies must file with Data Records Management Service, LLC. the proper documentation supporting tax-exempt status

#### **4.0 Terms of Agreement**

##### **4.1 Term (48 month)**

- a) DRMS (Data Records Management Services, LLC) provides Washington County Clerk computer hardware and DRMS software. The term of the agreement is 48 months.
- b) DRMS is responsible for the operations of the equipment. Any problems arising from the equipment is the responsibility of DRMS if DRMS provided hardware equipment to the Washington County Clerk's office. If hardware was not purchased from DRMS, we will maintain equipment and the Clerk's office will be responsible for equipment repair or replacement. (with the exception of 4.1e).
- c) This proposal entitles the Clerk's office with hardware & software support, including travel at no additional costs on all DRMS provided equipment.
- d) DRMS will respond within 4 hours and will attempt to repair or replace said equipment within 24 hours from the initial response call.
- e) Should any equipment failure or network failure occur, and the source of failure



is found to be malicious, intentional or by accident by anyone other than DRMS personnel, then the County Clerk's office will be financially responsible for repairing or replacing and any associated labor at the current labor rate.

- f) Data Records Management Services, LLC will invoice the Customer for the leased software monthly for the 48 month term based on the schedule.
- g) **Website creation:** DRMS will provide management and updates as well as offsite back-ups and replication services to guarantee data integrity. In an effort to offset costs associated with this service, the Washington County Clerk's office agrees that for the duration of the contract that DRMS will have exclusive rights to distribute public information and made available on our sister company website for sale at a low monthly subscription cost. This includes the distribution of bulk data. DRMS agrees to manage all calls relating to public information on the website so as to minimize calls made to the clerks office.

#### **Statement of Quality Assurance**

1. Data Records Management Services, LLC stands behind the products and services we provide. At the same time, we must rely on hardware and software manufacturers to test and provide accurate information about the integration of their products. If a manufacturer changes product versions and/or models affecting the interoperability of the solution we recommend to Customer, we will work on Customer's behalf to develop an alternative solution that meets with Customer's approval.
2. Data Records Management Services, LLC warrants that the Products are free from defects in material and workmanship. In the event of any defects in material and workmanship with the Product delivered during the installation or upgrade of a project, DRMS will repair or replace provided hardware at our cost.
3. Data Conversion: DRMS can only be responsible for accurate conversion of information available. DRMS will provide a means to this office to correct such information should it be required.
4. Data Records Management Services, LLC is only responsible for problems caused by changes to the configuration made by Data Records Management Services, LLC personnel and its subcontractors.
  - a. The warranty contained herein shall, with respect to any particular defect, be conditional upon:
    - i. Customer's substantiation that the Products have been stored, maintained and operated in accordance with such instructions as are given by Data Records Management Services, LLC to Customer and with standard industry practice and have not been damaged as a result of negligence, improper handling or accident on the part of any person other than Data Records Management Services, LLC, and



- 
- ii. Customer's payment of all invoices for the Products or other charges to which Data Records Management Services, LLC may be entitled, and
    - iii. Customer's exclusive use of persons approved or authorized by Data Records Management Services, LLC to effect any repairs to the Products, and
    - iv. Customer's substantiation that no modification or alteration of the Products have been made without the prior written consent of Data Records Management Services, LLC
  - b. No Products shall be returned to Data Records Management Services, LLC without Data Records Management Services, LLC's prior written consent.
  - c. In no event shall either party be liable to the other for any special, indirect, incidental, consequential or punitive damages in any way arising out of or relating to this contractual relationship, whether the claim alleges tortious conduct (including negligence) or any other legal theory

### **5.0 Governing Law**

This agreement shall be governed by, and in accordance with, the laws of the State of Kentucky. It is also expressly acknowledged that if any litigation should arise between the parties under this agreement, said litigation shall be resolved



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exclusively by the courts of the State of Kentucky, McCracken County.

**IN WITNESS WHEREOF**, the parties hereto have caused this Agreement to be executed in duplicate, by their respective authorized officials.

**Customer Turn-Key Solution (includes DRMS Software Suite & Hardware)  
Agreement: AUTHORIZED ACCEPTANCE**

- Hardware with 5 year extended maintenance service \$43,192.00
- Professional services for conversion, installation, configuration and training \$6,750.00
- DRMS Software Suite is leased for \$1,400.00 per month for 48 month term.

Signature of Acceptance:

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Washington County Clerk

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Date





March 25<sup>th</sup>, 2019

Teresa Marrinan  
Washington County Clerk  
114 N Cross Main St.  
Springfield, KY 40069

Dear Teresa,

Business Information Systems (BIS) is submitting this proposal regarding your preservation project in response to your invitation for bid proposal dated 3/07/2019.

BIS has successfully installed hundreds of software applications that are being used today by over 300 government entities. These previous implementation projects have laid the foundation for a successful installation of our land records management system for the Washington County Clerk's Office. BIS will meet and exceed the expectations of the Washington County Clerk's Office.

Please take a moment to review the enclosed proposal. The proposal includes answers to the *Special Conditions* section of your invitation, as set forth by the KDLA, as well as customer references, sample images and price quotations.

Any questions relating to this proposal should be directed to Jeremy Dulgar, Solutions Consultant, at 866.514.5192 or [Jeremy.dulgar@bisonline.com](mailto:Jeremy.dulgar@bisonline.com). We look forward to working with you in the future.

Sincerely,

Jeremy Dulgar  
Solutions Consultant  
Business Information Systems



Business Information Systems  
333 Industrial Park Road  
Piney Flats, Tennessee 37686

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**Special Conditions per the Kentucky Department for Library and Archives w/ BIS responses:**

**Note:** BIS responses are *italicized in blue*.

**1. Bid proposals for micrographics services will only be considered from offerers whose laboratories are certified by the Kentucky State Archives and Records Commission, or from offerers who use certified laboratories to process their microfilm.**

*BIS' microfilm processes are certified by the Kentucky State Archives and Records Commission and are guaranteed to meet or exceed all quality standards.*

**2. Work must be performed in accordance with applicable policies and regulations of the Kentucky Department for Libraries and Archives as stated in 725 KAR 1:0550. Microfilm produced with grant funds must be tested and approved by the Department before authorization for payment will be given.**

*BIS maintains a very high standard of ethical business practices. Our policies conform to the Kentucky Department for Libraries and Archives' standards and regulations. As with past projects, BIS does not expect or anticipate payment until after each roll is tested and approved by the department.*

**3. Copies of digital images created as a result of this project must be supplied to the Kentucky Department for Libraries and Archives upon completion of the project and before payment is rendered.**

*BIS will provide the Kentucky Department for Libraries and Archives Copies of digital images upon completion.*

**4. Offerers will supply all required diazo copies to the Kentucky Department for Libraries and Archives of any microfilm created as a result of the project once the primary copy has cleared quality control.**

*BIS will submit the silver master to the Kentucky Department for Libraries and Archives once the primary copy has cleared quality control.*

**5. Roll microfilm used in this project must be polyester based.**

*BIS' microfilm utilizes a polyester base.*



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**6. Micrographics services offerers must indicate the roll length that will be used and provide an estimated roll count for each line item that is accurate to within one roll. (Note that miscellaneous items that may be filmed together are indicated on the attached list.)**

*For the most efficient use of the storage facility, BIS utilizes 100', 131', and 200' rolls. Roll counts are calculated based on the number of images to be filmed and type of book.*

**8. Offerers for services must make an on-site examination of the materials before submitting a bid proposal. Special conditions or needs (photostats, bindings, physical conditions, formats, etc.) must be taken into account before a proposal is submitted. All proposals must include the date the on-site examination was made.**

*If necessary, BIS will perform an onsite evaluation of all materials. If an onsite evaluation cannot be made, a remote evaluation will take place via phone. BIS warrants that this proposal will meet all of Washington County's special conditions.*

**9. Clarifications of terms, descriptions, conditions or specifications for equipment/supplies is the sole responsibility of the offerer.**

*BIS will provide any further clarification of all terminology utilized in this proposal for the Washington County Clerk's Office and the KDLA when needed.*

**10. Bid proposals must include separate, itemized price quotes for each line item of the proposed project, or segment for which the offerer is making a proposal, and a total cost of all sections bid on.**

*BIS has constructed our proposal in line item format. The total price of the project can be viewed on the last line of the proposal.*

**11. Offerers must provide services or materials within the term of the grant following the beginning of the FY -19 and subsequent availability of state funds.**

*BIS has the capacity to satisfy the conditions of service in this proposal within the 2012-13 fiscal year.*

**12. Written notification from the local agency and the signed, returned obligation statement shall constitute a legal obligation on the part of the offerer to provide the services as stated.**

*Upon acceptance of our proposal, BIS accepts all legal obligations to fulfill any contractual agreements as outlined by Washington County and the KDLA.*



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**13. Selection of a bid proposal is contingent upon the award of the Local Records Program Grant and subsequent availability of state funds.**

*BIS shall not perform any services, provide any equipment, nor bill for either, prior to the receipt of grant funds.*

**14. Written bid proposals must be received no later than March 27<sup>th</sup>, 2019 to be considered.**

*BIS' proposal has been completed, as outlined, and shall be submitted within reasonable time prior to this deadline of March 27<sup>th</sup>, 2019.*



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BUSINESS INFORMATION SYSTEMS  
THE REGISTRY, LAND RECORDS MANAGEMENT SYSTEM  
PROPOSAL FOR WASHINGTON COUNTY, KENTUCKY



Contact Information:  
Jeremy Dugar, Sales Representative  
(866) 514-5192 or (423) 534-6929  
Business Information Systems  
333 Industrial Park Rd.  
Piney Flats, TN 37686



Business Information Systems  
333 Industrial Park Road  
Piney Flats, Tennessee 37686

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---

March 26<sup>th</sup>, 2018

Teresa Marrinan  
Washington County Clerk  
303 Court St.  
Covington, KY 41011

Dear Teresa,

Business Information Systems (BIS) is a service oriented data processing company. BIS, formally known as Professional Data Services, was created in 1977 to provide business solutions using the latest computer technology and programming techniques. We customize our installations to meet each customer's requirements while providing ongoing maintenance to ensure future compatibility as an office grows and its data processing needs change. BIS strives for 100% customer satisfaction and our business volume has grown accordingly over the years.

BIS has developed many software packages that are being used today by over 300 government and commercial entities. These financial, document management and imaging applications have laid the foundation for a successful implementation at Washington County.

The solution proposed by BIS utilizes leading-edge technology to enable Washington County to become the most efficient county recorder's office in the nation. The total solution provided by BIS integrates the key filing functions of cashiering, scanning, indexing, and document return. Some key system components include bar-coding, enhanced imaging and recording, automated indexing, redaction, index-image correlation, and superior public search mechanisms. All functionality and ideas of The Registry, records management software package are created, developed, implemented and maintained solely by BIS.

BIS has the fiscal capacity to fully implement, customize, and maintain The Registry records management solution. BIS' The Registry will meet all requirements and exceed expectations for the Washington County Clerk's office.

We look forward to the opportunity to serve Washington County and invite you to contact us at 1.866.514.5197 or visit us on the web at [www.bisonline.com](http://www.bisonline.com).

Respectfully yours,

Jeremy Dugar  
Business Information System



Business Information Systems  
333 Industrial Park Road  
Piney Flats, Tennessee 37686



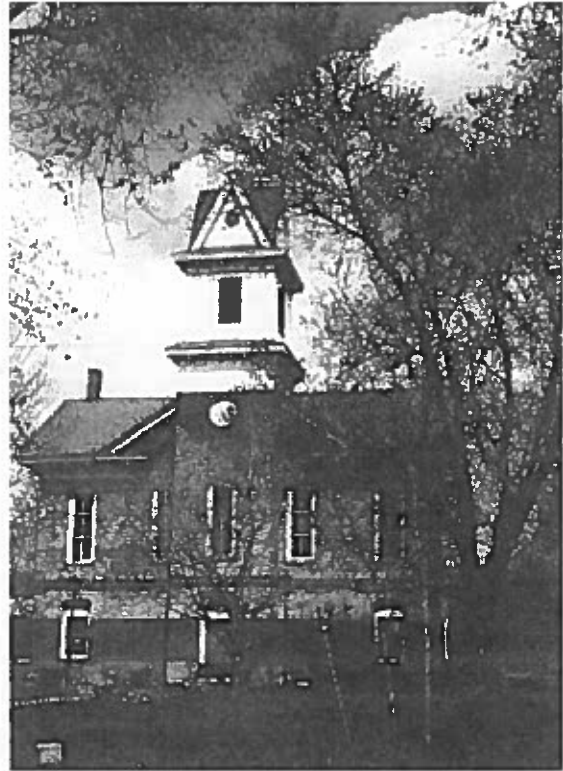
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## EXECUTIVE SUMMARY

In this proposal, Business Information Systems (BIS) provides the information for a Land Records Management System requested by the Washington County Clerk. This document contains our company background information and a summary of our ability to meet the demands of the services requested. A detailed workflow is provided charting the major components of our software, The Registry, and the deployment and implementation processes from start to finish. The Registry will be explained in terms of standard features and the extended modules used to enhance the software components. The O/S requirements and any additional software required to support The Registry will be outlined, including hardware requirements, so the Washington County Register of Deed's office can adequately prepare for their new system based on our recommendations.

Before installation, BIS will provide a detailed outline of the implementation and training overview so the Register's office can train with minimal effect on current daily operations. BIS will provide a detailed maintenance and support program that will demonstrate the level of support the Register of Deeds can expect. BIS is a service oriented company with a broad customer base in county government recording offices in six states (South Carolina, South Carolina, Arkansas, Tennessee, Kentucky, & Virginia) with more than 300 successful installations.

Business Information Systems is a data systems design partnership company founded in 1977 to help businesses and municipalities find solutions by using the latest computer technology and programming techniques. BIS is located in Piney Flats, Tennessee and is a partnership registered in the State of Tennessee. BIS has worked with County Clerks, Recorders and Registers for over 30 years and has a reputable presence in numerous counties throughout the southeast. Our years of experience have given us insight into issues county governments face and we have used this knowledge to implement solutions into our software.



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BIS continually strives to offer the most technologically innovative records management solutions in the country and takes a proactive approach in research and development. We continually search for enhanced equipment, methodologies, and the latest development techniques to make the records keeping process easier. Our quality assurance helps BIS continue to produce reliable and efficient software for the records keeping process. BIS also offers state-of-the-art imaging, scanning and microfilm services for storing records electronically for online accessibility, backup, and disaster-recovery.

Our continued persistence for excellence in customer satisfaction and software solutions has made BIS one of the country's premier government software providers. BIS' software services over 300 counties and we continue to grow throughout the southeast.

**Primary Contact:**

**Jeremy Dulgar**

**Office: 866-514-5192**

**Cell: 423-534-6929**

**Fax: 866-855-5999**

**Email: [jeremy.dulgar@bisonline.com](mailto:jeremy.dulgar@bisonline.com)**



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**333 Industrial Park Road**  
**Piney Flats, Tennessee 37686**

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## COMPANY BACKGROUND

BIS, founded in 1977 as PDS, is a Certified Microsoft Partner, Microsoft Dynamics Certified & Linux Red Hat Certified data processing company. We customize our installations to meet each customer's requirements while providing maintenance to ensure future compatibility as an office grows and its data processing needs change. BIS provides 100% customer satisfaction and our business volume has continued to grow accordingly over the years.

BIS solutions continue to meet the needs to over 300 government entities across the states of Arkansas, Tennessee, South Carolina, South Carolina, Kentucky, and Virginia. Our financial, distribution, manufacturing, web portal, document management and imaging applications have laid the foundation for a successful implementation at Washington County.

BIS maintains a full inventory of hardware (PCs, Servers, Printers, Drives, Memory, CPUs, Cables, Switches, Etc.) capable of supporting 300+ hardware customers and sales.

Certified Microsoft Partner, Certified Microsoft Dynamics – Navision Center, Networking, Fiber Optics, Citrix, Certified Linux Red Hat, Certified MySQL, SCO, VB, XML, PHP, .NET, Pearl, C, C+, Novell



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## ***Technology Architecture***

### **The Registry:**

1. Application
  - a. Application must be installed by user with Administrative privileges
  - b. Read, write and delete permissions
    - i. Windows Temp folder
    - ii. C:\Program Files\ The Registry
    - iii. Hkey\_Current\_User/software/
    - iv. Image Storage Directory
2. SQL Server Permissions
  - a. Administrative Rights
3. Web Application:
  - a. Access Permissions:
    - i. Read, Write, and Delete permissions to all files/folders in the application directory
  - b. Inbound Outbound Communication
  - c. Read write database access

The following portion of this Proposal outlines the necessary recommended hardware requirements to allow The Registry to exceed Washington County's performance expectations.

### ***Computer Workstations:***

#### **Minimum Requirements:**

##### **For Windows 8/10 Machines:**

Intel Core 2 Duo or AMD Equivalent  
2 GB RAM  
5 GB free hard disk space

#### **Recommended Requirements:**

##### **For Windows 7/8/10 Machines:**

Intel Core i5 or AMD Equivalent  
4 GB RAM  
5 GB free hard disk space

Note, The Registry can operate in use mode on a Windows PC and no part of the software depends on Java, Adobe or Flash.



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## THE REGISTRY SOFTWARE PROPOSED MODULE LIST

### FOR WASHINGTON COUNTY CLERK'S OFFICE, KENTUCKY

#### *Extended Security & Administration Module*

- Security modules use a variety of methods to control system access. First, there is password protected access to the network, second, the application layer security allows for variable security levels for each module of "The Registry"
- Allow for designation of "supervisor" rolls in each package
- Menu level controls are maintained by a supervisor
- Passwords expire at a pre-set interval & users must change their passwords regularly
- Passwords can be re-used until a preset time has elapsed
- Supervisors can require minimum password length, as well as a minimum number of alpha & numeric characters
- Supervisors are notified in real time if a given user ID fails to login 3 times in a row

#### *Enhanced Cashiering & Accounting Module*

- Manage escrow accounts with ease
- Track payments and charges with minimal keystrokes & effort
- Ability to lookup account balances in real time
- Transfer funds from filing account to copy account and vice versa
- Print or email a periodic statement of account activity

#### *Enhanced eRecording Module*

- Accept filing from all third party vendors
- Provides for a free submission portal to allow county offices and business to electronically submit to the ROD's office free of charge.

#### *Credit Card Processing Module*

- Enhanced cashiering allowing credit/debit transaction processing
- Updated accounting reports to reflect credit/debit transactions
- Fully integrated into The Registry land records management software
- Seamless with other modules



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#### *Imaging & Redaction Module*

- Scan a variety of paper sizes with auto page detection to remove excessive white space
- can multiple documents at one time with bar code detection technology (documents can be scanned in any order & the bar code detection software will automatically collate them)
- Multiple image enhancement tools including but not limited to:
  1. de-skew
  2. de-speckle
  3. border removal
  4. crop/trim
  5. manual brightness/contrast settings
- Scan at any point in the recording process, from the front counter to back office
- Automatic page count detection helps eliminate page count errors
- Images are made available to the public immediately
- Additional image quality check is available
- Automated OCR SSN Detection and Removal

#### *Enhanced Indexing Module*

- Easy to use indexing module allows for rapid data input
- Reference historical information to minimize keystrokes Index from paper OR from the scanned image
- Allowances made for a wide variety of indexing requirements
- OCR EZ Indexing

#### *OCR Verification Module*

- OCR Verification
- Partial blind double key
- Full blind double key
- Site verification with comprehensive verification listings

#### *General Ledger Module*

- Comprehensive general ledger module far exceeds Kentucky standards
- Each instrument is added to the general ledger at recording time; entries "posted" Automatically
- Allows for extensive reporting of your financial data
- Proven integration with a variety of finance office software packages
- Designed with the future in mind; provisions have been made for credit card transactions, as well as electronically filed documents.



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#### *Receipting Module*

- Designed for fast input- minimal keystrokes to record documents
- Flexible – temp index & scan during recording
- Seamless with other modules - no re-keying of data
- Simple and user-friendly
- Designed by a group with over 75 years of recording experience

#### *Automated Reports Module*

- Our enhanced general ledger module allows for a wide range of financial reports
- Productivity reports
- Error rate reports
- Recording status reports – identify non-completed documents
- Scanning statistics reports

#### *Internal Search Module*

- Provides immediate access to all index and image data
- Includes GT/GT index book module
- User friendly environment

#### *Off-Site Secure Backup/Disaster Recovery Module*

- Transactions are backed up to an optional second server in real time
- Transactions are backed up to a secured BIS server facility every 15 minutes
- Offsite backup provides a comprehensive disaster and recovery ability - Customer data and images are backed up to multiple secure locations for offsite data redundancy
- Real time back up allows BIS to restore a county to pre-disaster condition

#### *Internet Hosting & Search Module*

- BIS provides secure access to many customers' data in near real time
- Transactions recorded in the Register's office will be available to internet searchers within 15 minutes of recording.
- All major browsers supported

#### *Title Lien Statement Module – Kentucky Specific (Additional Fees Incurred)*

- Provides the ability to cashier and scan the title lien statements through The Registry application
- Will match the scanned title lien images with Kavis index data via nightly import for review by the Clerk's staff the following business day

#### *Marriage License Statement Module – Kentucky Specific (Additional Fees Incurred)*

- Provides the ability to process and record Marriage Licenses through The Registry application
- Provides ability for import functionality from online pre-submitted marriage applications into The Registry application for increased office efficiency



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***Delinquent Tax Module – Kentucky Specific (Additional Fees Incurred)***

- Provides the ability to calculate Delinquent Tax Bills and distribute funds to applicable entities
- Includes features such as future calculations, tax sale reservations, online records display and payment processing



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# PRICE PROPOSAL

## Software Costs

Item Description	Cost
The Registry – Records Management Software	\$40,000.00
<b>The Registry Modules:</b>	
Extended Security & Administration Module	
Enhanced Cashiering & Accounting Module	
Enhanced eRecording Module	
Credit Card Processing Module	
Imaging & Redaction Module	
Enhanced Indexing Module	
OCR Verification Module	
Electronic Document Routing Module	
General Ledger Module	
Receipting Module	
Automated Reports Module	
Internet Hosting & Search Module	
Internal Search Module	
Off-Site Secure Backup/Disaster Recovery Module	
Enhanced Finance/Point-of-Sale Module	
Title Lien Statement Module (OPTIONAL BUT ADDITIONAL)	Title Lien Statement: ADDITIONAL - (\$7,500.00)
Marriage License Module (OPTIONAL BUT ADDITIONAL)	Marriage License: ADDITIONAL - (\$7,500.00)
Delinquent Tax Module (OPTIONAL BUT ADDITIONAL)	Delinquent Tax: ADDITIONAL - (\$15,000.00)
<b>Total Cost:</b>	<b>\$40,000.00</b>

## Installation Costs

Item Description	Cost
Installation Costs:	
Software/Hardware Installation:	
The Registry Installation	
The Registry System Configuration	
<b>Total Cost:</b>	<b>Included</b>



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**Training Costs**

Item Description	Cost
Training Costs: See Training Schedule for details All Travel, Lodging and Misc. Expenses Included	
Total Cost:	Included

**Index Data & Image Conversion Costs (Current Digital Images)**

Item Description	Cost
Conversion: Historical Data Conversion (index) Image Conversion Financial Data Conversion (if applicable) Exception Reporting of Conversion Data	
Total Cost:	Included

**Website Hosting and Maintenance**

Item Description	Cost
TitleSearcher.com: - BIS hosts and maintains online search portal of land records via TitleSearcher.com utilizing our current pay per view or online subscription rates. (NO ADDITIONAL COSTS INCURRED)	
Total Cost:	Included



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**Hardware Costs**

Item Description	Cost
County to use existing hardware - See attached 'Hardware Quote' for hardware summary and costs	
<b>Total Cost:</b>	<b>\$18,717.00</b>

**Total System Price**

Item Description	Total Costs
'The Registry' Software – (optional modules available)	\$40,000.00
Installation	Included
Training	Included
Data Conversion (Current Digital Records)	Included
Website Hosting and Maintenance	Included
Hardware	\$18,717.00
<b>Total Cost:</b>	<b>\$58,717.00</b>



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**Maintenance & Technical Support Cost**

Item Description	Cost
<p>Maintenance &amp; Technical Support Costs for The Registry:</p> <p>Includes:</p> <p>24/7 Technical Support Email, Phone, Dedicated Project Manager Register &amp; County Staff ONLY</p> <p>Software Support:</p> <p>Toll Free 800 number M-F 8AM-6 PM, S 8AM-1PM Register &amp; County Staff Only (excluding public)</p> <p><b>*Begins Year Two (2)</b> Title Lien Statements Module (ADD additional \$1,000.00 annually) Marriage License Module (ADD additional \$1,000.00 annually) Delinquent Tax Module (ADD additional \$2,500.00 annually)</p> <p style="text-align: right;"><b>Total Cost:</b></p>	<p style="text-align: right;"><b>\$8,000.00 Per Year</b></p>



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*The following table illustrates the priorities assigned to different problem levels:*

Level	Definition	Action
Priority 1 (Highest)	Data integrity issues  Workflow issues that result halted production where an alternate solution is not available	Immediate response  Same day resolution
Priority 2 (High)	Workflow issues that create a decrease in production, but there is an alternate method for completing tasks.	1 hr response  1 day resolution
Priority 3 (Medium)	Issues that have minimal effect on office productivity.	1 day response  1-3 day resolution
Priority 4 (Low)	General inquiries and enhancement requests.	Case by case



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## 5 YEAR COST ANALYSIS

### Software Purchase Cost:

Year 1:	\$40,000.00
---------	-------------

### Software Maintenance Cost:

Year 1:	Included
Year 2:	\$8,000.00
Year 3:	\$8,000.00
Year 4:	\$8,000.00
Year 5:	\$8,000.00

### Installation & Training Cost:

Year 1:	Included
---------	----------

### Data Conversion Cost:

Year 1:	Included
---------	----------

### Hardware Cost:

Year 1:	\$18,717.00
---------	-------------

### Total 5-Year Cost to County:

Total Cost:	\$90,717.00*
-------------	--------------

\*BIS reserves the right to provide optional billing arrangements for the total purchase price. Options include but are not limited to monthly installments, quarterly installments, annual installments, or any other payment schedule with management approval.



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Piney Flats, Tennessee 37686

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# PROPOSAL

Business Information Systems  
333 Industrial Park Road  
Piney Flats, TN 37686

Proposal Number: SAQ9630  
Proposal Date: 03/26/19  
Page: 1  
Date and Time: 03/26/19 8:12:24

Sell

To: Washington County Clerk  
Teresa C. Marrinan  
117 N Cross Main St.  
Springfield, KY 40069

Ship Via  
Ship Date 03/26/19  
Terms CREDIT CARD

Customer ID 5  
SalesPerson

Description	Unit	Qty	Unit Price	Total Price
<<<<SERVER/NETWORKING>>>>				
Dell PowerEdge T440	EA	1.00	5,900.00	5,900.00
>> CENTOS SOFTWARE	EACH	1.00	0.00	
>> NEXT GEN XEN SERVER	EACH	1.00	0.00	
>> Backup Edge for Linux	EA	1.00	0.00	
Ubiquiti EdgeRouter Lite	EA	1.00	165.00	165.00
Smart-UPS 1500	EA	1.00	625.00	625.00
Managed 24 Port Switch	EA	1.00	250.00	250.00
USB 4 Port Hub	EA	1.00	22.00	22.00
Back Up Jump Drive	EA	5.00	22.00	110.00
<<<<SCANNING STATIONS>>>>				
VGA 19LCD Wide Screen	EA	4.00	150.00	600.00
Small Format PC	EA	2.00	750.00	1,500.00
DYMO 450 Twin Turbo	EACH	2.00	185.00	370.00
Fujitsu fi-7160 Scanner	EA	2.00	1,125.00	2,250.00
Epson TM-T20II POS Printer	EA	2.00	165.00	330.00
600 VA UPS	EA	2.00	85.00	170.00
<<<<CASHIERING STATIONS>>>>				
VGA 19LCD Wide Screen	EA	6.00	150.00	900.00
Small Format PC	EA	3.00	750.00	2,250.00
DYMO 450 Twin Turbo	EACH	3.00	185.00	555.00
Epson TM-T20II POS Printer	EA	3.00	165.00	495.00
600 VA UPS	EA	3.00	85.00	255.00
<<<<LOOOKUP STATTIONS>>>>				
VGA 19LCD Wide Screen	EA	2.00	150.00	300.00
Small Format PC	EA	2.00	750.00	1,500.00
600 VA UPS	EA	2.00	85.00	170.00

Amount Subject to	Amount Exempt	Subtotal:	18,717.00
Sales Tax	from Sales Tax	Invoice Discount:	0.00
0.00	18,717.00	Total Sales Tax:	0.00
		Total:	18,717.00



Proposal for

## Land Records Management System

Washington County, Kentucky

Teresa C. Marrinan, County Clerk

March 27, 2019

**Resolution<sub>3</sub>**  
LAND RECORDS MANAGEMENT

Cott Systems, Inc.  
2800 Corporate Exchange Dr.  
Columbus, OH 43231  
(800) 234-2688 | [www.CottSystemssystems.com](http://www.CottSystemssystems.com)

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Teresa Culver Marrinan, County Clerk  
Washington County  
117 N Cross Main Street  
Springfield, KY 40069

Cott Systems, Inc. is pleased to respond to Washington County's request for bid to obtain a Land Records Management System. Thank you for giving us the opportunity to earn your business.

Cott Systems is a 3<sup>rd</sup> generation company providing document recording solutions to local government for 130 years. Headquartered in Columbus, Ohio, Cott Systems is dedicated to serving the information management needs of local offices like yours. Many of our land registry clients received their first computer based land records system from us as early as the 1980's and continue to rely on Cott Systems to keep their offices current with the latest technology.

We are proposing Resolution3, our land records management system designed to provide security, stability, and ease of configuration. Resolution3 is a suite of integrated modules that provide a comprehensive solution to efficiently receive, record, store, and archive all records entrusted to your office. Once the State of Kentucky approves the eRecording legislation, Resolution3 also already has the ability to accept electronic recordings. Through our hosted services, records will be available for online searches with various subscription plans available to meet the custom revenue needs of the County. In addition, Cott Systems has included an electronic backup service to make sure your valuable records are secured at a separate site in the event of a local disaster.

We know a smooth and orderly implementation is required for a successful transition. Having completed many data migrations and system installations, our proven project management methodology will exceed your expectations. Our solution will be delivered by a team of experienced and knowledgeable professionals. This team will support you during all phases of the implementation without compromising your existing operations. Our highly rated Customer Support team will also be there to support your ongoing needs throughout the life of your contract.

Sheila Shafer, who represents Cott Systems in Kentucky, is authorized to serve as your contact regarding our submission. Sheila's contact information is below:

mobile: 513-910-9206

e-mail: [sshafer@cottsystems.com](mailto:sshafer@cottsystems.com)

Thanks again for the opportunity to be your partner for land records software. We look forward to working with you.

Sincerely,

**Mark Hellbusch | President**

Cott Systems, Inc. | 2800 Corporate Exchange Dr. | Columbus, OH 43231

[o\) 800-234-2688](tel:800-234-2688) | [e\) mhellbusch@cottsystems.com](mailto:mhellbusch@cottsystems.com)





Cott Systems to provide all the services a county recorder, town clerk, or register of deeds needs to meet the goals of preserving and modernizing the rich history of their jurisdiction.

## Cott Systems Today

Cott Systems offers an extensive array of products and services that help local government officials preserve, protect, record, and digitize the important public records entrusted to their care:

- Our newest land records solution, RecordRoom, is a web-based system that offers the latest cloud technologies with a simple, easy-to-use interface.
- Online Index Books delivers digital representation of original historical records and indexes online to the viewing public.
- Our robust Resolution3 land records management system provides all the tools for recording land record documents, including online system access, eCommerce, eFiling, and eRecording.
- Verdict case management system is a comprehensive solution for the entry, management, and disposition of court cases in local Clerk of Court offices.
- Cott iQ is our revolutionary intelligent search that crosses all of our product offerings and powers RECORDhub, our new revenue-generating public access solution.
- Complementing our software systems are data and imaging services that include historical redaction, backfile imaging, reindexing, books, binders and paper, index printouts, and microfilm.

## The Cott Systems Philosophy

Our people and technology have focused on one goal for more than 130 years: helping local land records officials and clerks of court deliver exceptional service to the public. Superior products and extraordinary services drive our growth. To succeed, we continue to focus on a culture of innovation and execution. We pride ourselves on three company values:

1. **Innovation** – We continuously push research and development forward with one objective - helping our customers advance to the next level of efficiency, service, and data integrity. This investment has resulted in 13 pioneering products since 2005 that lead the industry with cutting-edge technology.
2. **Customer Service** – Our people care about this business and our customers' success. Our associates are driven to help our customers solve issues and implement programs that support their operations. We are committed to creating and maintaining the highest level of customer satisfaction.
3. **Dedication and Experience** – Our focus on the officials responsible for records management in local government is possible because our dedicated team has a wealth of experience and knowledge. Cott Systems is committed to protecting our greatest asset by offering competitive compensation packages and a friendly, family-oriented work environment.

## SECTION 2:

### Our Solution



## RESOLUTION3 LAND RECORDS MANAGEMENT SOFTWARE

### Resolution3

LAND RECORDS MANAGEMENT

#### Software Description

Resolution3 is an integrated suite of land records management applications that provides Cott Systems' customers with a comprehensive solution to efficiently receive, record, store, and archive all records entrusted to their care. Secure public access to data and images is provided via the Internet.

#### System Architecture

Resolution3 is built around Microsoft Windows specifications. The underlying architecture integrates internet, client-server, and PC models of computing to provide a stable, scalable, standards-based platform. The software was developed using Microsoft.NET. The database engine is Microsoft® SQL Server®. Many of our customers are using Windows7® and Windows10® with 32 bit or 64 bit processor. Resolution3 can be installed on a dedicated server or in a virtual environment.



#### Software Modules

Resolution3 is a fully integrated system that provides all the functionality required to process a recorded instrument from acceptance through document return and includes the following modules:

- Fees/Cashiering
- eRecording
- Indexing
- Imaging
- Cott iQ Intelligent Search

Data elements are entered into the system a single time, at the earliest point of entry, and are immediately available to all other steps in the workflow requiring that element. There is no duplication of effort and no redundant data entry. These modules operate within a flexible user-definable workflow, allowing you to maximize labor efficiencies by dynamically choosing the workflow right for your office on any given day or at any workstation. Resolution3 offers many distinct workflows, including the popular "scan at the front counter" for walk-in recordings. Resolution3 also features unlimited indexing capability for all official documents. This can include vitals, maps, minutes, burial permits, liquor licenses, military discharges, trade names, and any other document your office is required to officially record.

## Resolution3 Fees/Cashiering Module

Speed, accuracy, and security are the hallmarks of Cott Systems' Cashiering Module. The goals of providing prompt service to the public, ensuring accuracy, and enforcing generally accepted accounting principles need not be mutually exclusive. By employing user-maintainable tables and drop down menus for information such as customer type, chart of accounts, bank accounts, recipients, transaction types, and fee schedules, a large amount of data can be captured with very few key strokes.

### CASHIERING COLLECTION MODULE FUNCTIONS

- Electronic cash register
- Creates document recording label or cover sheets
- Initiates capture of indexing information that provides up-to-the-minute search capabilities
- Financial reporting

Resolution3 cashiering stations utilize standard PCs along with a receipt printer with a check endorser, label printer and/or laser printer for cover sheets, and optional cash drawer.

If multiple transactions are processed under a single receipt, the system allows the operator to enter the additional transaction types. A running total is displayed for the receipt as well as the amount of the transaction currently being processed. Once all transactions are entered, the payment screen appears. A transaction is not recorded until payment is received.

### PAYMENT SCREEN FEATURES

- Displays total number of transactions contained in the receipt and transaction amount
- Displays the subtotals for recording fees and transfer taxes
- Allows multiple payment types: payment by charge (if the customer has a valid account), check(s), cash, credit card, or any combination
- Calculates payment received and verifies it against the amount due
- Instructs the operator if additional payment is required
- Prevents completion until full payment is made
- Calculates over/underpayment amounts and enforces appropriate actions
- Allows the operator to review (in summary or detail) previous transactions for data accuracy
- Corrections can be made and new totals are calculated, should an error be discovered
- Allows the operator to suspend the entire transaction if the customer cannot make full payment (the transaction can be easily recalled from suspense once the customer makes full payment)
- Prints a receipt to complete the transaction
- Prints a document label or cover sheet with all assigned numbers

Depending on the desired workflow, the operator is now able to fully index the document, partially index the document, (first grantor/grantee only), or proceed to the next transaction. The document is now available for search. The index entries for these documents will be clearly identified as incomplete (partially indexed) or not verified (fully indexed). In the final step of the fees process, the system assigns a book/page or file number, prints a recording label (or cover sheet), and the required tax stamps.

A full range of reports are available by report type, date range, and workstation ID number. Many reports are available in summary and detailed formats. These reports will help provide cash balancing, deposit, and many

other day-to-day functions. All reports may be printed or viewed at the workstation. Data can be exported in numerous file formats (e.g. Microsoft Excel) for distribution and input to other financial systems. Daily, Monthly, and Yearly reports can also be archived to CD, eliminating the need to store large volumes of paper. A Crystal Reports module can also be used to generate ad-hoc reports.

## Resolution3 eRecording Module

Our eRecording technology provides a fast, efficient, and transparent process that allows the seamless processing of electronic documents in the same familiar fashion as traditional over-the-counter documents. Our eRecording technology is built on recommended PRIA standards and utilizes the latest open technology. Resolution3 is capable of receiving electronic submissions supported by standard web services made available to desired submitters. Model 1, 2, and 3 electronic submissions are supported.

### eRECORDING FEATURES

- User notification when recording packets arrive
- Multiple acceptance workflows available
- Intermingle with front-counter acceptances
- Intermingle with mail processing
- Dedicated eRecording acceptance station(s)
- All, or any combination of the above
- Dual monitor processing required
- Complete acceptance and rejection capabilities
- Upon acceptance, appropriate document stamps electronically applied
- Documents fall seamlessly into existing workflow after acceptance
- Statistical reporting
- Fully integrated with Simplifile, CSC and ePN

## Resolution3 Indexing Module

The Indexing Module continues the flow of the document through the indexing clerk who adds whatever information is necessary to process the document through the indexing office. Any information that was captured through the Cashiering Module is brought forward, and processed. Indexing may be done from the original hardcopy document or from the scanned image.

Speed of entry and ease of navigation, accuracy, and audit trails/reporting are critical elements of Cott Systems' Indexing Module. Producing an accurate index is the primary goal of the indexing software. All documents are processed through a structured flow, and can be managed either document by document or in "units of work." These "units of work" can be given to multiple indexing clerks for simultaneous entry into the system. Name standards can be incorporated to ensure the consistency of indexed names. For example, rules can be established that will not allow specific abbreviations such as special characters (&, @, etc.), or abbreviated names ("Auto Drillers" versus "Automatic Drillers"). The rules can be established to automatically change the entered abbreviation, warn the user of the abbreviation, or prevent the user from continuing without making a correction. Status reports allow the supervisor to monitor the work of each individual and the status of the document in the entry process. Each document must be cycled through the entire workflow process before it is



reported as "verified" in the index database. The software supports two methods of quality control: key verification or verification from printed "proof lists."

Speed of entry is achieved utilizing special copy features, individual and firm name tables, and property tables for consistency of data entry. Unlimited grantor and grantee names are supported as well as multiple property descriptions or other reference information such as parcel number.

Many documents refer to other previously recorded documents, and this information should be accurately reflected in the index. Resolution3 supports the entry of unlimited "Original Book/Page" entries and allows the indexer to designate whether multiple originals should be "linked" or remain separate. When recording a release that refers to its original document, partial releases, and assignments, all documents can be "linked" and show indicators in the search that these documents are associated with each other. Conversely, if a blanket release is recorded, releasing several documents that are unrelated to each other, the indexer would indicate that these documents are unrelated and the search would only indicate the relationship between each original and the release, showing no relationship between the other documents on the same release.

When a document is presented and is deemed to be unrecordable, a rejection letter can be generated, listing the reason(s) for rejection. A record of this rejection can be maintained and searched, letters can be regenerated, and the queue can be cleared if a document is re-presented correctly.

## Resolution3 Imaging Module

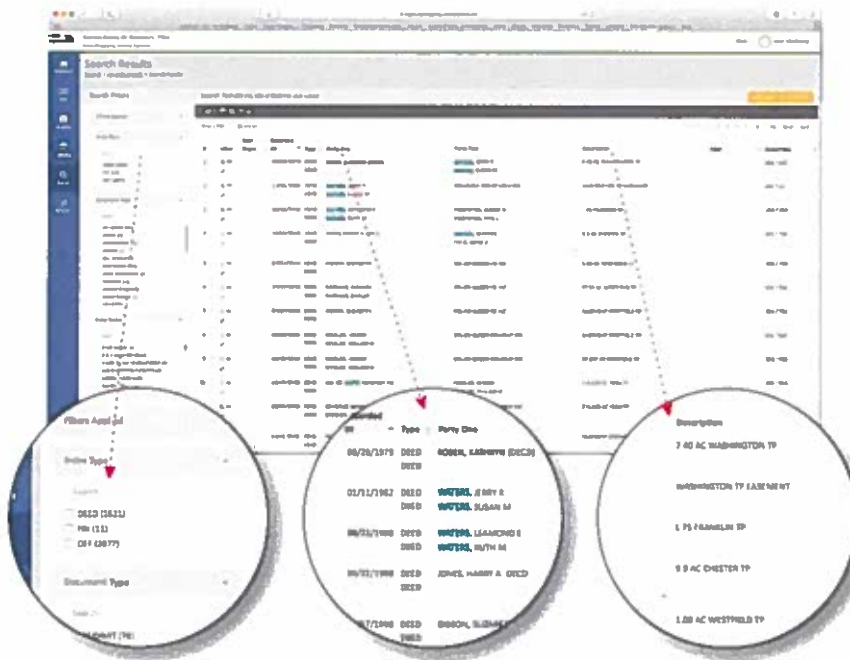
Scanning, storing, retrieving, and printing - Resolution3's Imaging Module provides flexibility with Cott Systems' "any point scan technology." With this technology, Cott Systems does not dictate the document workflow but instead empowers the customer with the ability to dynamically choose what workflow is best for them. Whether you want to scan a document immediately upon its presentation, or once it has been accepted for recording, or not until indexing and verification has been completed, the choice is yours. The user-defined workflow options allow you to determine where in your workflow scanning fits best. The Imaging Module will read the barcode label created by the Fees Module and automatically index the images to the corresponding database entry. The imaging station personnel will perform a preliminary visual quality check of the images. Quality control software will allow the operator to insert, append, delete, rotate, or re-shuffle images as needed. Image enhancement and cleanup options such as hole-punch removal are also available. Images may be exported to CD/DVD for distribution to interested parties and/or the creation of microfilm.

## Cott iQ Intelligent Search

A fundamental shift in searching and presenting land records, Cott iQ intelligent search technology offers an intuitive search that is easy for all searchers to use – from the novice to professional title searcher. Searchers have one single-field entry point that allows for a range of search criteria.

Intelligent search technology does the work, and Cott iQ returns results from across the entire set of data, not simply one column of data. The streamlined, straightforward approach to searching looks and feels familiar to your searchers, creating less confusion and uncertainty.





Search results are clear, concise, and easily navigated with fewer clicks of the mouse - all with a look and feel familiar to anyone who has spent time surfing the web. Results are present in a crisp, intuitive grid, and users are provided with a wide variety of sort and filter options. Just like many popular shopping sites, initial search results can be pared down until you find exactly what you are looking for.

The detail view provides all the necessary information on one screen: thumbnail sketches of the document pages, an image of the selected page of the document, and all the indexing information. There is no need to move from screen to screen to see all the indexing data and the image.

Cott iQ has been designed for the internet with the average internet user in mind. Figuring out how to access your collected data via the web was not an afterthought - it was the primary thought. The screens and method of presenting your data have a clean, intuitive design so that the public, your current staff, and your future staff will recognize and be comfortable with the look, feel, and method of navigating through the system.

## RECORDhub eCOMMERCE GATEWAY

RECORDhub is Cott Systems' public access solution designed to offer industry leading flexibility. With RECORDhub, you can be online 24/7 providing a revenue generating gateway to quickly and easily search your land records from anywhere.



Housed in our secure, state-of-the-art data center, our redundant hardware architecture allows RECORDhub to guarantee high availability access. Using the latest in programming technology, our experts have designed a clean, straightforward, and intuitive interface. RECORDhub has a variety of subscription plans and rates that can be tailored to best meet your revenue generation goals. RECORDhub has been designed to enable self-service to avoid incurring administrative overhead. Using RECORDhub, you will experience both control and increased revenues combined with ease of use for your staff and constituents.

## You Are in Control

RECORDhub puts you in charge with flexible subscription plans that allow you to set your own access rates. Subscription types can include Daily, Monthly, Annual, Per Minute and Pay-As-You-Go.

## The Power of a Single Line Search

By leveraging Cott iQ, Cott Systems' simple, yet feature-rich search technology, RECORDhub provides access to indexed information and images for all your recorded instruments by using one simple search line. Search results are up-to-the-minute accurate and are displayed in a familiar design that reduces inquiries and confusion, making it easy for all searchers to use – from the novice to the professional title searcher.

### RECORDhub FEATURES

- Timely and accurate public access to your data
- Powerful, industry-leading search capability with Cott iQ technology
- Familiar, simple interface that reduces frustration and user support needs
- Flexible subscription plans and pricing for searchers
- Flexible revenue sharing models to fit your needs



## eBACKUP SERVICE

eBackup utilizes the latest server technology to provide an off-site backup of data stored in Resolution3 without the need for local officials to build their own infrastructure for off-site backups. Without any user intervention, a scheduled electronic backup of new file entries and file modifications is encrypted and sent via a high-speed Internet connection to our secure backup location in Columbus, Ohio. This location is a Tier IV-compliant, carrier neutral data center with dedicated computer rooms, dedicated cages, dedicated racks, dedicated power (triple-redundant UPS power with 2 power feeds from 2 sub stations and motor generator in both AC and 48 VDC), high-security (card access control with biometrics and video recording), cross-connect services, and triple redundant cooling. This means that in the event of a disaster, your office can rest assured knowing that your irreplaceable data can be put back in place up to the previous evening.



## SECTION 3:

### Our Deployment Approach



## DATA MIGRATION

A successful data migration project requires knowledgeable Migration Analysts. At Cott Systems, we are fortunate to have a team of analysts that have a total of 50 years of combined experience specifically in data migration.

No one knows your data as well as you do, and it is our job to work with you to assure that all of your conversion expectations are met. We strive for accurate and complete conversions every time. The Migration Analyst assigned to your project is responsible for the entire data conversion process from start to finish and will work with your data until you are completely satisfied.

We follow four steps when tracking the progress of a migration project, and each phase of the project is important to the success of the other phases:



### 1. ANALYZE

Before we can begin to work with your data, we must take time to understand its history. During the Analyze Phase, we will explore how your data was captured, its previous migration path, and any historical data loads. Computer systems 20 to 30 years ago rarely had the editing and formatting capabilities of today's software. This can play a critical role when it comes to the validity and completeness of your index search. Understanding how your data was captured allows us to look for changes in formatting that could present obstacles during migration. This phase includes:

- coordinating acceptable methods for the transfer of data and documentation
- reviewing file layouts and evaluating name formatting
- validating index types and date ranges
- identifying potential areas of concern



### 2. EXTRACT & TRANSFORM

This phase receives all the benefits of the time spent during the Analyze Phase. We will review and evaluate potential areas of concern. The data is scrutinized for inconsistencies and action plans are created to address the issues. Customer communication increases during this phase. If there is a need to manipulate the data from its existing format, the customer must validate all changes before the action plan can proceed. During this phase, migration applications are written, audit lists are generated, and samples of converted data are created.



### 3. VALIDATE

Testing is finalized during this phase. Using the knowledge, plans and results from the previous phases, we run a final conversion test of all data. If the final test run produces audit lists that require attention, our Migration Analyst will contact you to explain the diagnostics and provide possible options to resolve the issue. Finally, a delivery of data plan is set.



### 4. LOAD

Coordinating the delivery of your data is key to successfully meeting the “go-live” deadline. During this time, we gather your final piece of data - “gap data” recorded after initial data backup was delivered at the start of the project. The gap data is merged with the remaining data and imported. During this phase, the Migration Analyst will coordinate the cut-off date and time for your existing system, import the converted data, and create a data migration summary report.

## IMPLEMENTATION

The Cott Systems Implementation team has over 75 years of experience implementing in 20 states. With over 400 successful implementations, our team possesses the expertise and knowledge to configure, consult, train, and identify risk factors. Cott Systems utilizes best practices and time-tested policies to ensure a quality implementation and a smooth transition:

- Proven project management methodology
- Project plan creation with acceptance milestones
- Risk factor identification
- Ongoing project review by Cott Systems management
- Resources committed throughout project life cycle
- Continuous assessment and improvements

The implementation process consists of several phases which include a discovery process with you and Cott Systems’ Project Manager to explore areas of challenge, best workflow practices, and everyday needs and requirements for your office. This will determine how the system should best be configured.

### Project Assignments

Drawing on the expertise earned from over 400 installations, Cott Systems will establish a team to guide you through the different phases of the implementation. The team will utilize project management principles from the Project Management Institute and will include these key resources:

- **Implementation Specialist** – Project manager, trainer, workflow consultant, software configuration
- **System Specialist** – Software/hardware installation with a focus on the technical environment
- **Migration Programmer** – Review and research existing data and images for conversion to Resolution3

#### Project Management

- Data conversion process
- Discovery process with site analysis
- Workflow discussion & planning
- Training environment configuration
- Configuration, review, & acceptance

#### Training

- Agenda creation & acceptance
- Training schedule
- Webinar training sessions
- 24/7 independent training

#### Installation

- Hardware & software installation
- Server installation & migration

#### Go Live

- Final migration
- Public search training sessions
- Transition to customer support
- Post implementation review

## USER TRAINING

Our trainers have over 25 years of combined experience. They understand the hurdles you face in getting everyone up to speed with minimal impact on daily operations. What sets our training programs apart from other companies is that we recognize that your needs are unique and tailor your training sessions accordingly.

Cott Systems offers many training options: onsite, web-based, or a combination of both. Training is provided to introduce users to product features, set-up functions, process flows, and instruction on daily tasks.

Your staff and public users will be introduced to your new software in small increments. Leading up to your system implementation, an Implementation Specialist will guide you through each function. After each session, you will be given time to apply the knowledge gained using a dedicated training environment configured to simulate your office. Once the training is complete, our Implementation Specialist will guide you through transitioning to your new software package.

## SECTION 4:

### Ongoing Assurance & Support



## SOFTWARE ASSURANCE

Cott Systems continuously invests in enhancing our products. We evaluate new features on a continuous basis and selectively incorporate new features in our quarterly updates. Cott Systems' Software Assurance Program contains two elements: customer support and software update services. Software Assurance begins as of the go-live date and will last until the end of the contract. Our Assurance Program entitles the customer to receive, at no additional charge, software "patches" and software "releases" to the current version of Resolution3 which increase the speed, efficiency, or ease of operation of the software.

## CUSTOMER SUPPORT

Building a close relationship with our customers has been the key to our success. Cott Systems Customer Support is its own business unit that has board-level visibility and Key Performance Indicators (KPIs) to measure customer satisfaction levels, response/resolve rates, and answer times. Our analysts and programmers average 7 years of industry experience, and are passionate about ensuring your experience is nothing less than excellent.

To ensure your experience is positive, we have an escalation process that can be engaged anytime either by the customer or internally to create more awareness and responsiveness to an issue. This process is supported by weekly operations meetings attended by executive level staff. All escalated issues are reviewed and action plans are developed to remedy outstanding customer concerns as soon as possible.

### What you can expect from Cott Systems Customer Support

- A dedicated staff based in Ohio providing a customized level of service with a personal touch.
- A support team grouped into areas of expertise working collaboratively to resolve issues.
- Key Performance Indicators monitored at the executive level to ensure service requirements are met.
- Random quality checks for each analyst to ensure that you are receiving the best service possible.
- Management and analysts who meet weekly to review all open tickets.
- A defined escalation procedure that includes bi-weekly review of accounts that require extra care.

## Team Approach

Customer Support is organized into product centric teams. This structure allows each analyst to develop expertise in a concentrated area. Team members are encouraged to work together to resolve issues using all available resources to ensure your questions are answered accurately in a timely manner.



**Land & Data** – Analysts who specialize in supporting Cott Systems’ land records, vital records, and data applications. Subjects include RecordRoom, Resolution3, eRecording, Auto Redaction, Animal Licensing, and Marriage Licensing.



**Court & Web** – Analysts who specialize in supporting Cott Systems’ court and web-based applications. Subjects include Verdict, Jury Management, eSearch, Online Index Books (OIB), Online Marriage Applications, and PropertyCheck.



**Infrastructure** – Technicians who specialize in supporting the infrastructure portion of your solution. Subjects include servers, workstations, operating systems, anti-virus software, Cott Systems software installations, peripherals, and backup solutions.



**Software Development** – Systems engineers and software developers who are subject matter experts in coding Cott Systems’ software products. Subjects include software patch management, software enhancement requests, and state-mandated programming changes.

## Contacting Cott Systems Customer Support



### 1. CUSTOMER SUPPORT PORTAL

<https://cottsystems.microsoftcrmpportals.com/> – Customers can submit tickets, track support requests, and browse our knowledge base of information with how-to instructions.



### 2. TOLL FREE HOTLINE

**800-588- COTT** – Customer Support is available Monday - Friday, 7am to 6pm EST, excluding holidays.

**Voicemail** – Customers have the option of leaving a voice mail message for the support team. Voicemail is checked hourly during normal business hours.



### 3. EMAIL

**support@cottsystems.com** – For less urgent issues, customers may email the support team. Email sent to this address is checked within one hour of receipt during normal business hours.



## SECTION 5:

### Software, Hardware Pricing



1. **Resolution3 User Licenses.** 5 users, 2 search.
2. **Estimated Annual Filing Volume.** 2,000 Instruments, 7,000 Images.
3. **Data Migration.** Index data from 1960s and images from 1980s through current will be migrated to new service. Equates to approximately 280,000 images (18gb) included.
4. **Implementation.** Project management and service installation are included.
5. **Deployment.** Local.
6. **eRecording, eCommerce, eBackup Services.** Included.
7. **RECORDhub eCommerce Gateway.** Revenue share TBD.
8. **Training.** Cott Systems will train you and your staff on the features of the Service. Prior to training, all changes in office procedures, workflow, or job duties must be relayed to all staff members involved. Trainees must be available during the designated training times as determined by Cott Systems and Customer. Training hours include:
  - Thirty-one (31) hours of live webinar training; four and a half (4 ½) days of onsite training with Go-Live support.
9. **Hardware and Support.** Includes staging and installation, seven (7) onsite install days.
  - **PowerEdge T440 Server**
    - For virtual Domain Controller, virtual Database Server, virtual Internal Webserver
    - With 19 inch monitor
    - With Uninterrupted Power Supply (UPS).
    - (2) Processors, 128GB Memory, RAID Controller, (4) 600GB Hard Drives.
    - (3) Sophos Server Protection (antivirus)
    - (4) Windows Server 2016 Standard Edition, (9) CALs
    - MS SQL Server Standard 2017, (6) CALS
    - Veritas Backup Exec 2015 with SQL and VMW agents
    - LogMeIn Central remote access software
    - LTO-6 Internal Tape Drive, (10) TLO-6 Tapes.
    - 5 Years ProSupport and Mission Critical 4Hr Onsite Support Services
  - (3) Workstations with single 22 inch monitors, 8GB Memory
  - (2) Workstations with 20 and 22 inch dual monitors (for eRecording), 8gb Memory
  - (2) Public Search Stations with 24 inch monitors, 4GB Memory
    - Stations come with 5 Years ProSupport with Next Business Day Onsite Services, Windows 10 Pro, 500 GB Hard Drives, Sophos EndPoint Protection (antivirus)
    - Monitors come with 5 Years ProSupport with Advanced Exchange Service
  - (1) Small flatbed scanner
  - (1) Small LaserJet printer

- (5) Label printers
- (5) Slip/receipt printers
- (1) Small network switch

10. Onsite Survey: March 14, 2019.

**Software LEASE | Schedule of Payments | 60 month term**

Invoice upon receipt of signed contract	\$20,450
Invoice upon Go-Live Date (deployment)	\$20,450
Invoice Monthly, starting 1 <sup>st</sup> of month following Go-Live Date	\$810 / month

**PURCHASE | Schedule of Payments**

Hardware	\$50,925
Hardware Staging and Implementation	<u>\$25,525</u>
Total Hardware	\$76,450
Invoice upon receipt of signed contract	\$38,225
Invoice upon Go-Live Date (deployment)	\$38,225

Invoices are due within thirty (30) days of issue.

TERM: the sixty (60) month contract term to begin 1st of the month following Go-Live (deployment).

Pricing Authorized by: Deborah A. Ball  
Deborah A. Ball, Chief Executive Officer

Date: 3/25/2019

**PLEASE NOTE:**

The pricing in this offer is valid through 9/25/2019. After this date, this offer will be priced at the current rate.



DATE 3/19/2019  
Quotation #

Quotation For:  
WASHINGTON COUNTY CLERK  
TERESA C. MARRINAN, CLERK  
P. O. BOX 446  
SPRINGFIELD, KENTUCKY 40069

Tri-State Systems, Inc.  
85 Southview DR  
Cadiz, Kentucky 42211

Quotation valid until:  
Prepared by:  
Jimmy Calvert

Comments:  
ROLLER SHELVING AND ROLLER DESK BID

SALESPERSON	P.O. NUMBER	SHIP DATE	SHIP VIA	F.O.B. POINT	TERMS
JIMMY CALVERT			SPRINGFIELD KY		
QUANTITY	DESCRIPTION			UNIT PRICE	AMOUNT
(1) ONE	S-113 16 HIGH ROLLER SHELF STARTER UNIT				
(1) ONE	S-113 16 HIGH ROLLER SHELF ADD-ON UNIT				
(1) ONE	PAIR S-113 FINISHED END PANELS				
(1) ONE	13 FDF 4-64 FLAT TOP 13 INCH DEEP FOUR TIER DOUBLE FACE ROLLER SHELF DESK				
	PRICE INCLUDES INSTALLATION, CLEAN UP & FREIGHT				
				SUBTOTAL	\$ 9,527.80
Customer Acceptance:				TAX RATE	
				SALES TAX	
				OTHER	
				TOTAL	\$ 9,527.80

Customer Acceptance:

Visit us on the web at [www.tri-statesystems.com](http://www.tri-statesystems.com)



RECEIVED  
COUNTY CLERK

2019 MAR 22 PM 2:29

WASHINGTON CO. KY.

1

*Ron Cooper Co.*  
P.O. BOX 609  
GRAYSON, KENTUCKY 41143-0609  
PHONE (606) 474-8715  
FAX (606) 474-8853  
TOLL FREE (800) 726-6968

Teresa C. Marrinan  
Washington County Clerk  
P.O. Box 446  
Washington, KY 40069

March 19, 2019

Dear Teresa,

Thank you for the opportunity to provide you with a price quote for Roller Shelving units per your bid request. Please find the quoted price below for the roller shelving units and roller shelf desk specified per your request.

**Bid Proposal:**

The total cost for the 2 Roller Shelving units and 1 Roller Shelf Desk listed in your bid request dated, February 28, 2019, is: \$11,990.00. The color specified for these units is tan/brown. This total includes shipping/handling/freight, delivery and installation/set-up costs.

The bid request did not specify that the price quote be itemized. Since an itemized list was not requested I did not want to clutter the price quote with too many details. However, if you need an itemized price list for each Roller Shelving unit and the roller shelf desk just let me know. I am happy to provide that for you. If you have any questions, please feel free to call or email me with any concerns. Once again, thank you for allowing me to provide you with this quote.

Sincerely,



Stacy Dodgion, President  
RonCooperCo@gmail.com



**Donna Rose Co., Inc.**

## **QUOTATION**

**To: Washington County Clerk  
At: Teresa Marrinan**

**Date: March 21, 2019**

**We are pleased to submit the following estimate for your consideration:**

Description	
2 sets-Roller Shelving Specifications: Standard depth, 2 wide x 16 high with end panels. Color tan/brown. (this is 2-#214, 2-214-A, And 2- 241 end panels.)	
1-RD-804 DFF – double sided, flat top roller desk with 4 section on each side, standard depth, with end panels color tan/brown.	
This bid for the above items include freight and installation	
	<b>Total Bid \$11,750.00</b>
Note: This is Larson Metal Mfg.,Inc. shelving and desk	

**P.O. Box 127, Keene, KY 40339 \* 859.224.0383 \* Fax 859.224.0381**

*Thank you,  
Submitted by: Donna Rose  
Quote good for 30 days.*

**Marrinan, Teresa C (Washington County Clerk)**

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**From:** Kandy Newman <[knewman@crs-tn.com](mailto:knewman@crs-tn.com)>  
**Sent:** Thursday, March 14, 2019 2:03 PM  
**To:** Marrinan, Teresa C (Washington County Clerk); [kandynewman@countyrecordsservices.com](mailto:kandynewman@countyrecordsservices.com)  
**Subject:** RE: roller shelving inv to bid

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Teresa,

We do not wish to bid on the roller shelving bid.

Thanks,

Kandy Newman  
County Record Services, LLC

**From:** Marrinan, Teresa C (Washington County Clerk) <[Teresa.Marrinan@ky.gov](mailto:Teresa.Marrinan@ky.gov)>  
**Sent:** Thursday, March 14, 2019 1:00 PM  
**To:** [kandynewman@countyrecordsservices.com](mailto:kandynewman@countyrecordsservices.com)  
**Subject:** RE: roller shelving inv to bid

Can you send me a no bid email or letter

**From:** Kandy Newman <[knewman@crs-tn.com](mailto:knewman@crs-tn.com)>  
**Sent:** Thursday, March 14, 2019 1:55 PM  
**To:** Marrinan, Teresa C (Washington County Clerk) <[Teresa.Marrinan@ky.gov](mailto:Teresa.Marrinan@ky.gov)>; [kandynewman@countyrecordsservices.com](mailto:kandynewman@countyrecordsservices.com)  
**Subject:** RE: roller shelving inv to bid

We did receive the bid. We did not bid because our supplier said someone had to be on site to put them together and we do not have that capability.

Thanks,

Kandy

From: Marrinan, Teresa C (Washington County Clerk) <[Teresa.Marrinan@ky.gov](mailto:Teresa.Marrinan@ky.gov)>  
Sent: Thursday, March 14, 2019 12:38 PM  
To: [kandynewman@countyrecordservices.com](mailto:kandynewman@countyrecordservices.com)  
Subject: Re: roller shelving inv to bid

Yes

Sent from my iPhone

On Mar 14, 2019, at 1:06 PM, Kandy Newman <[knewman@crs-tn.com](mailto:knewman@crs-tn.com)> wrote:

Is this for the Dept of Library and Archives?

From: Marrinan, Teresa C (Washington County Clerk) <[Teresa.Marrinan@ky.gov](mailto:Teresa.Marrinan@ky.gov)>  
Sent: Thursday, March 14, 2019 11:58 AM  
To: [kandynewman@countyrecordservices.com](mailto:kandynewman@countyrecordservices.com)  
Subject: roller shelving inv to bid

Good Morning

I had sent an Invitation to bid proposal for roller shelving to you by regular mail, I was checking to see if you had received that and if you need any additional information.

Please let me know

Thank You

Teresa  
Washington Co Clerk